



DEPARTMENT OF THE NAVY
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5400
Ser N1/ 20
13 Apr 00

From: Commanding Officer, Engineering Field Activity,
Mediterranean
TO: Commander, Atlantic Division, Naval Facilities
Engineering Command
Subj: IMPLEMENTATION OF INTEGRATED PRODUCT TEAMS (IPTs)
Encl: (1) EFA MED IPT Operations Manual
(2) IPT, Europe and North Africa
(3) IPT, Italy
(4) IPT, Bahrain

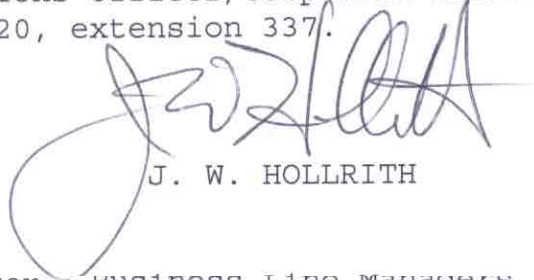
1. Effective 6 March 2000, EFA MED is delivering its full line of products and services through its Italy, Europe and North Africa, and Bahrain IPTs.

2. The MED IPT Operations (Ops) Manual, enclosure(1), has been prepared as a handbook for all IPT members giving selected information and guidance on day-to-day production. Specific details for each Business Line will be added as appendices. Enclosure (1) as well as the Capital Improvements Business Line (CIBL) details, Appendix B, were completed during a working session the week of 13 March. Participants included Mr. Paul Wang (MED DOPs Officer), Mr. Rick Flansburg (EFA MED Italy IPT Leader), Mr. Roger Saunders (EFA MED Bahrain IPT Leader), Mr. Phil Bolton (LANT CIBL Manager), Mr. Steve Bennett (NATO/LANT Core Project Manager Supervisor), Mr. Bill Crone IV, Mr. Gary Mackey, LCDR Leanne Aaby, and Mr. David Isbell (Design and Construction Line Leaders and Coordinators), and Mr. Dave Lamoreaux (Director of Contracts LANT). Updates are necessarily anticipated and will be coordinated. Distribution of the IPT Ops Manual to the team members will be via the IPT leaders.

3. The MED IPT Leaders are Mr. Rick Flansburg (Italy), Mr. Kevin Stigile (interim Europe/N. Africa), and Mr. Roger Saunders (Bahrain). Enclosures (2), (3), and (4) identify personnel assignments required for full implementation of the EFA MED IPTs. In almost every case, these same personnel supported MED AOR production prior to the stand-up of our IPTs and their continued efforts are key to our effectiveness. These members will receive their work assignments through the appropriate IPTL and function per the Ops Manual.

Subj: IMPLEMENTATION OF INTEGRATED PRODUCT TEAMS (IPTs)

4. My Point of Contact for all "Reengineering" issues is Mr. Paul Wang, Deputy Operations Officer/Component Business Officer, Code 09A1, at DSN 626-4720, extension 337.



J. W. HOLLRITH

copy co:

LANT (OPS, Business Officer, Business Line Managers, 02, 01)

LANT (Product Line Leaders, CIBL NATO PM)

NORTH CO

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EFA MED (ESG, N1, 09MC, 09C)

Italy IPTL

Europe/N. Africa IPTL

Bahrain IPTL

EFA MEDITERRANEAN INTEGRATED PRODUCT TEAM OPERATIONS MANUAL



13 April 2000

Distribution:

Code 09

Code 09A

Code 09A1

Code N1

Code N2

Code N4

Code N5

Code N6

Code N8

Code N9

Rota Office

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LANT (MILCON Program Manager, NATO Program Manager)

Italy IPT Leader

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Bahrain IPL Leader

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INTEGRATED PRODUCT TEAM OPERATIONS

1.0 PURPOSE

EFA Mediterranean is a process driven, client focused, interdependent organization with selected core competencies. Our products and services are delivered through documented processes and are reviewed periodically for efficiency and effectiveness. We rely on a client interface system that provides a single point of contact when needed, and easy access into the organization for our clients. We exist only to serve the client and deliver to them the highest quality product through the fastest, most cost-effective process available. We provide products and services through cross-functional teams who have all the resources and functional personnel necessary to deliver the products and services to meet or exceed client expectations.

The Integrated Product Teams (IPTs) are dedicated to delivering high quality products and services in a timely and cost effective manner to a select number of clients. The IPTs accomplish this through frequent communication between the clients and the Activity Liaison Officers (ALnO) and by keeping processes streamlined and current. The dedication to make facility management work easy for our clients may cause our internal management to be more difficult. Management controls and coordination must evolve to insure that new challenges can be resolved efficiently and effectively. We will use strategic and annual/regional planning to forecast trends of future client needs so we can prepare the acquisition strategy and personnel expertise required to meet or exceed those needs. The IPTs strive to be the provider of choice for their clients.

This MED Integrated Product Team Operations Manual has been prepared as a handbook for all IPT members giving information and guidance on day-to-day production. Specific details for each Business Line, Contracts and Host Nation Liaison are/will be added as appendices. Updates are necessarily anticipated and coordinated manual revisions will be forwarded to the above distribution.

2.0 ROLE IN THE ORGANIZATION

The EFA MED IPTs are responsible for delivering all of the products and services to clients within their respective area footprints or areas of technical responsibilities except for those products and services that are global/regional in nature and overarch more than one IPT's geographic responsibility. We have the duty to assist our clients in the planning, development, design, construction, maintenance, and operation of their facilities. The Operations Officer exercises operational control over the IPT. The Resident Officer in Charge of Contracts (ROICC) / Field Teams are an integral part of the IPT from conception to completion and turnover maintenance and operation of completed facilities. The ROICC reports to the Operations Officer.

3.0 BUSINESS PLANNING

3.1 *Market Assessment:*

The size of the IPT is shaped through a client needs assessment. The assessment begins with client input from the Liaison Officers and program input from the BLMs/PLL/PLCs. The IPTs will analyze the input to assess theater-wide workload and resources required. EDM/RAP impacts will be in turn assessed and coordinated with EFA Operations as discussed below in **Resources**.

3.2 Acquisition Strategies:

The IPTL is responsible for coordinating Acquisition Strategy for all products and services.

Standard Format to be developed.

Part of the process of delivery of products and services is to strategize delivery and position tools for use by the IPT. Senior Leadership, including the IPTLs, Contracts, and EFA MED Operations coordinate with PLCs/PLLs to develop regional acquisition strategies balanced by client input and preferences provided by the Liaison Officers.

The EFA MED Chief of Contracts is responsible for coordinating all AOR contract needs, capacity, and procurement. All A/E contract announcements (CBD or European) and S/S/S participation will be reviewed / coordinated with the appropriate IPTL, Norfolk Contracts, PLL, and PLC prior to issuance.

OPs will chair a Production Control Board for the purpose of routine review of general IPT production with a disciplined forward look at workload. The PCB will be hosted every 3-4 months – with the exact cycle determined based on Business Line program cycles. Elements of the board discussions include group review of all future MED AOR product and service deliveries, consensus on regional acquisition strategies, agreeing on specific delivery acquisition strategies and reaffirming IPT resources. The PCB meeting will rotate between Norfolk and Naples and has the following standing representatives: OPs/DOPs, IPTLs, respective BLMs/PLLs/PLCs, Contracts Officers and MED Host Nation Liaison Officer.

3.3 Resources:

The IPTL will review and influence the initial EDM (both resident and virtual) to confirm that adequate resources are planned. The IPTL will influence discussions between the MED PLCs and the LANT PLLs to recalibrate the staffing. Should unresolved conflicts occur, EFA Operations will initiate negotiations with EFD BLMs to resolve.

The IPT leader is responsible through the Operations Officer to budget for labor and support for those team members for which he/she exercises administrative control. PLCs are responsible for budgeting, managing, and controlling the annual budget for labor and support of core assets, in close coordination with the IPTLs.

4.0 CLIENT AND PROGRAM COORDINATION

4.1 Clients:

The IPT delivery involves direct communication with clients. Once the Acquisition strategy is initiated the team members routinely adjust / adapt through this communication.

4.2 Liaison Officer (LnO): The LnOs are client connections to the IPTs and are communication and coordination facilitators before, during and after deliveries.

The Claimant Liaison Officer is the single point of accountability for quality and service to our claimant clients for the IPTs, while facilitating business lines and business line development, execution, and delivery to the client claimant. The EFA MED CLnO will meet clients routinely to

influence conceptual development of MILCON 1391's, Special Projects, Integrated Priority Lists, etc.....predecessor actions before IPT production efforts are started.

The Activity Liaison Officers (ALnOs) are dedicated to base activity clients and are key to the client interface process as horizontal connections to the IPTs. The ALnOs monitor progress of various key production efforts of the IPTs as internal feedback loops within the IPT. The IPT would use that info to course correct or validate on target deliveries. The IPT can expect the ALnOs to advocate for the clients for all products and services and lead the clients to identify requirements, identify product options, determine available funding sources, and define schedule expectations/limitations. The relationship between the ALnO, the client, and the IPT should be one where the actual delivery is sorted out with client intelligence from the ALnO, ultimately delivered by the IPT at expected quality, cost, and schedule....validated by the ALnO to the IPT to affect process changes for all future deliveries. Additional information regarding the Liaison Officer concept can be found in the NAVFAC Atlantic Concept of Operations.

4.3 Determining Client Expectations:

ALnOs (as lead) with selected IPT members are responsible to get with the client during the initial development stages of a project to define expectations and agree on level of quality, timeliness, cost, and accessibility. A request for services is received from a client, through a self initiated Client Request and Evaluation Form (CREF) through the EFA MED Web Site or prepared by the person that receives the work from the client if not the ALnO. Clear written definition up front minimizes false starts or missed production efforts that increase product costs. During the project production/delivery prompted by client personnel change or differing situations, the Project Manager (PM) and the ALnO will sit down with the client to re-establish expectations.

4.4 Client Satisfaction:

By working exclusively with a specified number of clients at a designated geographic AOR, the IPT will become increasingly effective at meeting expectations and maximizing client satisfaction.

4.5 Product Line Coordinators (PLC):

The PLC's role in Client and Program Coordination is in direct support to the team. The PLC is responsible to monitor, evaluate and improve the production processes being used by the IPT. PLCs shall also ensure that clients are accounted for and programs are in focus, and that the best in class production systems are in place to facilitate the future deliveries. The Product Line Leader (PLL) serves a complimentary role at the division level for a division-wide perspective.

4.6 Special Assistants:

Naples resident Special Assistants are available for Legal issues, Mixed Commission approvals, Host Nation Coordination, and Appraisals, and are considered full and accountable production elements of the IPT.

5.0 IPT ROLES AND RESPONSIBILITIES

The Integrated Product Team is a geographically based execution team that has the clear responsibility and accountability to deliver products and services to the clients in that AOR. The members of the IPTs are either resident (in Naples or at one of the ROICCs) or virtual (located

currently in Norfolk and Philadelphia); and will participate on deliveries in either a part-time or full-time basis.

5.1 Integrated Product Team Leader (IPTL):

The IPT Leader (IPTL) exercises operational control over IPT members and reports directly to the Deputy Operations Officer. The IPTL is responsible for the Team performance and expected deliveries through deliberate vertical and horizontal integration of all assigned work production of the IPT. The IPTL is expected to positively contribute to balancing resources and workload, assembling acquisition strategy information, monitoring team metrics, applying consistent use of Management Information Systems, and ensuring positive team morale.

5.2 Project Manager (PM):

The PM is the person most qualified to lead a project. The asset can be drawn from anywhere in the NAVFAC Corporation. The project could be planning; design; construction; real estate; environmental compliance; environmental planning; utilities; etc.

While the ALnO is the client's initial POC to get work into the Command, the PMs are the POCs for project specific information during production. The PM is required to integrate and interact with other members of the team and organization as necessary to execute a project. On a project's life span, there must be continuous coordination with several areas of expertise. The PM must ensure a smooth and orderly integration from one phase or area to the other. The responsibilities of the PM require a broad technical background; knowledge of general business practices and general contractual vehicles; legal constraints; and good leadership and people skills.

The PM exercises control of a project by monitoring performance against schedules and budgets from beginning to end and insuring that the project stays on schedule and within budget. The PM, in most cases, will not perform all the tasks themselves; however, they are responsible for insuring that they are accomplished. The PM responsibility begins upon receipt of a project assignment originating from a CREF or from some other source or authorization and ends when the project/task is completed and/or closed out.

The PM recommends the proper contractual vehicle or in-house source to accomplish the project to meet the client's expectations. In managing the project, the PM must always be aware of the type of project, funding source, schedule budget, and any constraints. Type of project and funding source is extremely important to avoid exceeding any statutory limits for scope and funding.

Where extensive workload at one installation needs enhanced integration and coordination, the products and services deliveries will be coordinated by a Senior Project Manager.

Senior Project Managers perform three functions in their role: 1) assist the IPTL in workload assignments, distribution, management, monitoring of workload, and feedback on individual performance; 2) provide specific expertise and mentoring of the team members; and 3) oversee the execution of all Product and Service deliveries for the installation. The responsibilities include production integration and monitoring, execution, insuring product quality, database oversight, and insuring coordination with the ALnOs. Senior PMs function on behalf of the IPTL.

5.3 *Team Members:*

The concept of the Integrated Product Team is that one multi-functional integrated team accomplishes all work items. EFA MED, as a forward-deployed arm of Atlantic Division, will rely heavily on part time members, both in theater (resident) and from other locations within the corporation (virtual). The part-time member acts as a member of the IPT for completion of the required work. Part-time and full-time members (resident or virtual) are OPCON to the IPTL; ADCON remains with the designated supervisor. Close coordination between the IPTL and the PLL/PLC will be required to insure that priorities are established and all members provide the support required by the Project Team.

The participation of virtual (non-resident) assets will be key to EFA MED Team structure. As a forward deployed arm of Atlantic Division, EFA MED is interdependent and resourced with the majority of production assets located in Norfolk in the Atlantic core. The heavy dependence of virtual assets within the team is unique to EFA MED and will require special coordination and communication efforts. Periodic Production Control Board Meetings will be established to maintain workload balance within the EFD. In addition, projects which are initiated out of cycle with the meetings will require coordination between the IPTLs, PLCs/PLLs, BLMs and the Operations Officers of the EFA and EFD to insure that project execution teams are adequately staffed.

5.4 *Contracts Team Members:*

The team contract specialists have the ability to accomplish the majority of the execution for the team. With Contract Specialists on the IPT, all A-E, Construction, Service, etc., contract actions are awarded within the team or in vertical coordination with the ROICC. By being on the same team, partnering between the technical members and Contract Specialists is easily accomplished. The Contract Specialists are involved at the beginning of the procurement process and participate in the acquisition strategy and establishment of the project milestones.

The Contract Specialists support the product lines by providing the following functions as IPT members: award all contract actions, participate in the Project Specific Acquisition Strategy Meetings, provide contractual guidance to the team members; perform contract pre-award / post-award actions.

5.5 *Resources and Administrative Support:*

Business support for the MED IPTs will be obtained from staff outside the IPT. Business support includes administrative (travel coordination, training support, etc.), Information Technology Support (software and hardware) and Budget and Accounting.

The Program Analyst and Management Analysts (PA/MA) support is provided through an individual assigned part time to the IPTL. The PA/MA could be virtual or resident. The Program and Management Analysts are responsible for various financial responsibilities.

6.0 *PRODUCT AND SERVICE DELIVERY*

6.1 *Forming Project Teams:*

The IPTL is responsible for ensuring that an appropriate PM has been assigned for the project, but will rely upon assistance from Senior PMs, Product Line Coordinators, and ALnOs. Project team formation for anticipated projects will be initially discussed during Production Control Board

Meetings. For out-of-cycle projects, a proposed integrated team composition will be developed by the IPTL fully coordinated with Operations, Contracts, and the PLLs/PLCs.

The project team meets with the client, reviews the client's expectations, and performs a site visit, if necessary. The project team assesses execution alternatives (acquisition strategy), special support needs, project schedule, and project finances. The project team works directly with the ALnO and the Client to define the requirements, finalize the execution and financing plans, establish reporting requirements, and set the project goals. The project goals and client expectations are documented using the CREF, which will be used by the ALnO and the client at the completion of the work to evaluate the project team's performance.

Once team participation has been established changes in resident or virtual team member participation are to be coordinated with the respective IPTLs/PMs.

6.2 *Field Office (ROICC) Coordination:*

Field Offices are multi-functional, forward deployed at the client locations and right sized to execute continual, predictable, and routine client requests. The Field Office is a vertically integrated part of the IPT.

When a project is initiated at HQ, the PM is responsible to contact the ROICC for assignment of a AROICC/AREICC. That AROICC/AREICC, as a member of the team, is involved during all phases and is fully integrated into the decisions so he/she has a better understanding of the project and the client's requirements. The ultimate goal is reached when the AROICC/AREICC and the rest of the IPT members' actions are complementary and are completely integrated for the most effective delivery.

Field Offices are responsible for the execution of all projects locally generated or assigned to their office, maintaining client and project team relationships during the field administration phase, and for the complete satisfaction of the client they serve. Physically located closest to the client, they must provide the project teams feedback and knowledge gained from previous deliveries.

6.3 *Product and Service Delivery:*

Delivery of a Product or Service starts with the beginning coordination meetings and understanding of the client requirements. For complex projects, IPTs are responsible to investigate / initiate discussions / meetings to pull together the base level, user and client representatives to ensure that the full immediate use of the facility is a success upon delivery. The discussions/meetings should prompt actions to cover requirements not included in the NAVFAC product delivery. IPTs are responsible to identify any follow-on maintenance, training, warranty, or other service contracts in support of the project.

6.4 *Client Feedback:*

The team and ALnO meet with the client to fill out the post-delivery part of the CREF form. During the meeting, the team, the client, and the ALnO discuss performance issues. Any issues identified, or global concerns, are taken to the appropriate IPTL or PLC to discuss, prioritize and make process or system improvements. The BLM/PLL/PLCs are jointly responsible for responding to the feedback with either validation of current practices or actions to adjust whatever is necessary to affect improvement.

6.5 *Project Follow-up/Lessons Learned:*

ALnOs have the responsibility to periodically follow-up with clients. The ALnO's are responsible to ensure Post Delivery Surveys are activated. Problem areas are identified to ensure immediate resolution pending funding. ALnOs shall work with the management team to ensure long range solutions are determined and recovery strategies are put in place. Lessons learned on critical items will be reviewed by IPTLs/PLCs with solutions outlined for distribution across all IPTs.

7.0 PERSONNEL MANAGEMENT:

7.1 *Community Management*

The Community Manager (CM) is responsible to ensure that the IPTs deliver the highest quality Products and Services. The CMs are charged with keeping a constant forward look at client directions and preferences to ensure that IPT member skills are advanced enough to deliver the future expectations. For resident IPT members outside the Product Line, the IPTL will be responsible for Community Management. In most cases the CM will be the PLC.

IPTLs are responsible to work with PLCs/PLLs to insure that each team member has an IDP, which includes: core courses, developmental and team courses, and mentoring required for employee growth. The process of core competency maintenance starts with a periodic skill assessment of personnel. All supervisors are responsible to insure that individual assessments are conducted and this information is used to develop Individual Development Plans.

7.2 *Performance Evaluations:*

The Alternative Performance Appraisal System (APAS) guidelines will be followed. IPT support will be addressed in the Critical Elements and appropriate Optional Assignments in the APAS for all members. Input for the APAS evaluation may also be solicited from clients, ALnOs, and others who have had dealings with the employee throughout the rating period. The IPTLs assure proper coordination with other leaders during the APAS process to assure that: 1) each team member is clear on their execution responsibilities and 2) each team member knows which action items they must accomplish each year to support the Command's annual plan. IPTLs provide input to the Contracts Department on all contracts personnel on the IPT, provide the Operations Officer input on ALnO's performance, and provide input to the PLC/PLLs on the performance of all team members.

7.3 *Awards:*

Awards should be primarily focused to acknowledge the superior efforts of teams. Awards should be issued at the completion of the significant effort. The IPTL will ensure appropriate recognition for all team members (resident and virtual) through coordination with appropriate Payroll Managers. Teams will be evaluated on various factors, including success on specific projects, coordination with clients, working with field or site personnel, and process improvement participation.

8.0 COMMUNICATIONS AND TEAMWORK

8.1 *Communications and the Virtual Team:*

Effective communications are key to the success of the team. Devices will need to be developed to insure awareness of all team members of specific project status, initiatives, issues, and even planned absences. Current methods of communication include team e-mail, conference calls, AMS, and

video teleconferencing (VTC). Additional devices include real time CREF software, enhanced project management software, effective metrics, and other report generating software to assess team performance.

On-site presence of team members is necessary and will be planned for project, program and community management. Events that require travel shall be identified and coordinated with the appropriate supervisor.

8.2 Team Meetings:

Team meetings are an essential part of the teambuilding process and should utilize all available means to facilitate that process (VTC, emails, conference calls, internet chatrooms, etc). Some of the purposes of team meetings include project specific issues, execution review, admin and personnel, financial status, client project status and ALnO issue meetings. Conducting an efficient and effective meeting is key to maximizing the time of the participants. Team meetings should be planned well in advance and have published agendas to insure their effectiveness. Monthly IPT calendars are normally published which list the significant meetings coming up.

8.3 Reporting:

Reporting on the delivery of Products and Services by the IPT consists of the following:

FIS – General description, purpose and responsible persons for reporting data to be added.

Acquisition Management System (AMS) – Each project is logged into this tracking/management system for the purpose of real time recording of PM management of project or service deliveries and extraction / viewing of project information by ALCON. The PM is responsible for maintaining the project AMS record.

Monthly Execution Meetings – Held each month and scheduled 1 year in advance. The purpose of the meeting is to review general information for “on track” projects and specific information on projects chosen by any of the participants due to schedule, scope, funding or quality issues. The projects reviewed are normally selected high interest projects by OPs or the IPTL. The reviews will be ordered by IPT, chaired by the IPTL with the appropriate PMs and attendees include OPs and appropriate Business/Product Line representatives.

Routine Execution Data Calls – Includes Quarterly Letter to the Chief (MED Admin Officer prepares and coordinates input from OPs, IPTLs, PMs, and appropriate staff members), Monthly Execution Brief to LANT 09/00(CIBL MILCON Program Analyst prepares and coordinates input from OPs and IPTLs).

Random Execution Data Calls – Execution data calls originating from any source will be directed to OPs for appropriate coordination and IPTLs to initiate parallel action.

APPENDIX A PLANNING

APPENDIX B

CAPITAL IMPROVEMENTS BUSINESS LINE

Key MCON Projects Milestones for Effective Deliveries:

October/November: 1391 Plus MCON project team meetings held at activities, coordinated client meeting will be held at this time to discuss ALL facility programs/projects for the execution year +two and three.

January/February: PCEs prepared for submission in early March for year + two.

April/May: Shore Facilities Programming Board is concluded; annual MCON Workload board meets based on the results and goes over the upcoming design program.

May/June: Approximate design authorization date.

After annual MCON Workload Board meeting, CLnO meets with CNE and other major clients to discuss program and discuss global issues regarding upcoming work and funding issues.

Acquisition Strategy

Acquisition Strategies will be decided in the Production Control Board Meetings. For Out-of-Cycle projects, the Acquisition Strategy determination will be made during the regularly scheduled execution meetings. The Production Control Board hosted by MED Operations will be scheduled with the CIBL to ensure optimum coincidence with the MILCON cycle events. A yearly schedule will be published with a standing list of attendees.

Production location determination will be one of the Production Control Board decisions as part of the Acquisition Strategy.

Project Design Execution

Architect/Engineer Contract Administration/Integration: (process improvement required) Draft Appendix A, Scope of Work, will be developed by the PM and reviewed by the appropriate team members prior to issuance to the A/E. All design efforts in theater will include local criteria, construction materials/methods, and host nation submittal requirements. The ROICC will provide input to insure field investigation and PCAS services are indicated in the Appendix A.) PCAS services will be negotiated as priced options at the time of final design negotiations including, accommodation for the A/E to attend the Pre-Construction conference.

LANT Core Project Manager Supervisor:

The supervisor of the virtual CIBL PMs executes a role of MED AOR production advisor. In this role he/she offers requested council to the PMs or other team members on issues/decisions that affect product and service deliveries. On an as needed basis the production advisor acts on behalf of the respective IPTL to allow for continuous forward production progress. To affect this role the supervisor will have standing participation in theatre work reviews, PCB mtgs, etc.

LANT Core NATO Manager

For product or services supported with NATO funds the detail shape of the project and complete acquisition strategy requires coordination with the NAVFAC NATO Manager. This coordination will normally occur as part of the quarterly Production Control Board mtgs. The NATO Manager is in the Atlantic Division core resident in Norfolk.

Norfolk generated contracts: **(process improvements required)** The Norfolk CS is responsible to provide copies of all contract documentation (basic award, change orders, and all official correspondence will be provided to Naples Contracts.

Upon PM release of the Authority to Advertise memo, the Norfolk CS will pass ACO authority to Naples CS.

If modifications are necessary during the PCAS phase, Naples Contracts will issue modifications using the "A" designator and will provide copies of all documentation to Norfolk Contracts.

Naples generated contracts: (process improvement required) The Naples CS is responsible to provide copies of ALL contract documentation (basic award, change orders, and ALL official correspondence will be provided to the PM).

A/E Invoices: **(process improvement required)** All contract actions and invoices must include a detailed fee breakdown and list of all priced options. Invoices must include a sufficient level of detail / back-up documentation to allow review and verification of services rendered.

Invoices without sufficient detail will be returned with a recommendation for non-payment. Design invoices received by Naples or Norfolk contracts will be forwarded to the PM for certification of the related services. PCAS invoices received by Naples or Norfolk contracts will be forwarded to the AROICC/AREICC for certification of the related services.

A/E Ratings: The AIC/EIC prepares and coordinates the A/E rating upon completion of design. The final design rating will be included in the design release package. During construction, the AROICC/AREICC is responsible to prepare periodic interim and final A/E ratings and forward to the appropriate Contracts office.

Design Administration/Integration

MILCON Design Administration: The Capital Improvements BLM coordinates with NAVFAC on all program matters/status, and provides Program Status Reports to 00 and the Board of Directors. The BLM MILCON Program Manager receives the Design Authorizations (DA) for MILCON work, regardless of production location. MILCON Design Funds will be accepted and administered by EFA MED AOR assigned PA's in Norfolk. The Norfolk PAs will request a construction

contract number from the Naples PA, load funding into FIS and load the project into AMS. Naples PA will establish a local JON at this time. MILCON Program Manager will forward copies of the design authorization and appropriate project documentation to the MED Ops and the respective IPTL.

Design and pre-award schedules will be proposed by the PM and coordinated with the IPTL/MED Operations Officer prior to design start.

Variance Memos will be prepared by the Design PM and forwarded via Naples OPs to CIBL MILCON Program Manager.

Non-MILCON Design Administration: The DAs should be forwarded to the IPTL to initiate Acquisition Strategy discussions. Design Funds will be accepted and administered at the production location. The PA at the production location will request a construction contract number from the Naples PA, load funding into FIS and load the project into AMS. Copies of all project documentation will be provided to the PM.

Design and pre-award schedules will be proposed by the PM and coordinated with the IPTL/MED Operations Officer prior to design start.

Advance Notification of Site Visits / Field Investigation: (process improvement required) The PM will notify the AROICC/AREICC no less than two weeks in advance of an A/E site visit to an Activity. The AROICC/AREICC will coordinate with local personnel and facilitate necessary base passes.

Design Submittals:

If production is accomplished in Norfolk:

Naples will conduct reviews for 1) Host Country code compliance, and 2) Contracts input. Two copies of each design submittal will be provided to the PLC directly from the A/E design firm. The PM will follow-up A/E submittals with correspondence indicating the Norfolk point of contact and due date for comments. The PLC will coordinate the review and forward comments to the PM by the requested due date. Responses to comments will be provided with subsequent submittals. Design review meetings will be coordinated by the PM.

If production is accomplished in Naples:

Norfolk will conduct reviews for 1) Life Safety (Structural/Seismic and Elevators) and 2) additional discipline reviews as agreed when the team was established. Sufficient copies of each design submittal will be provided to the PLL review coordinator (currently 04A1) directly from the A/E design firm. The PM will follow-up A/E submittal with correspondence indicating the Naples point of contact and due date for comments. The PLL review coordinator will coordinate the review and forward comments to the PM by the requested due date. Responses to comments will be provided with subsequent submittals. Design review meetings will be coordinated by the PM.

Value Engineering: The PM is responsible for coordination with the Norfolk VE Coordinator for all projects with a construction value over \$1M. Norfolk VE Coordinator will determine the appropriate level of VE.

Host Nation Liaison / Italian Mixed Commission Approvals: Naples Host Nation Liaison Office is responsible for managing the Mixed Commission approvals of Italy located projects. All Acquisition Strategies shall allow for appropriate process time. Refer to the Mixed Commission Guidebook for process details and supporting documentation requirements.

Construction Considerations during Design/Construction Preaward

ROICC Reviews: One copy of each design submittal will be provided to the AROICC/AREICC directly from the designer. The PM will follow-up on A/E submittal with correspondence indicating POC and due date for comments. The AROICC/AREICC will coordinate the constructability review and forward comments to the PM by the requested due date. Responses to comments, with annotated actions to be taken on the comments will be provided with subsequent submittals. Design review meetings will be coordinated with the AROICC/AREICC.

LANTDIV Construction Office (Norfolk): Submit one ½ size pre-final, final, and as awarded plans and specifications for all Military Construction/NATO or other large and/or technically complex projects.

OMSI/Facilities Support: The PM and Base Ops Support PLC will ensure OMSI and maintenance support services are marketed to clients prior to A/E contract award. OMSI and Facilities Support will be negotiated as priced options at the time final design is negotiated with the effort to be completed as a PCAS item. OMSI and Facilities Support information is generally produced by the designer of record. Specific IQ contracts are available if the designer of record does not have this expertise. For Design/Build contracts, the construction contractor's A/E produces the information. Specific requirements will be included in the specifications during the design production effort.

Interior Design/Collateral Equipment: The PM and Collateral Equipment Specialist will ensure that services are discussed with clients prior to A/E contract award. Comprehensive Interior Design will be negotiated as a priced option at the time of final design. Collateral Equipment Procurement assistance is available to clients from the Norfolk CE coordinator on a reimbursable basis.

Specifications: The designer will provide Division 1 through 16 technical specification sections. The CS will prepare all Division 00 specifications required for advertisement and obtain legal sufficiency review from Naples Council. Since the CS is a part of the team and involved throughout design, coordination of J&As and D&Fs shall be identified and prepared by the PM early so as to not impact the project schedule.

Design Release: **(process improvement required...**printing/distribution to ROICCs) Regardless of the production source, the design release package to be provided by transmittal to the PM for coordination with the CS will include the following:

(For station awarded projects, the transmittal is forwarded directly to the station CS with the exception of Italian Code Compliance which is forwarded in all cases to Naples Mixed Commission).

CDROM with final signed and stamped drawings (PDF format)

CDROM with final specifications Divisions 1-16 (PDF format)

List indicating government distribution of construction contract documents

Hard Copy of official "Final" cost estimate
 Copy of WBS level 3 version of the cost estimate – quantities only – on disk
 Project Information Form (advance copy provided at the time of A/E final submittal)
 A/E final rating for design and ACO transfer mod to A/E contract
 Italian Code Compliance and Structural Certification

Major Claimant validation provided via AMS (if applicable).

Final Signed and Stamped drawings will be retained at the production location.

Source Selection: The CS is responsible for preparing Source Selection Plans (SSP). Draft SSP and board membership will be reviewed by the ROICC, the PM, and Naples Contracts. Applicable portions of the SSP will be included in Division 00 by the CS.

ICB: In general, all ICB procurements will be accomplished by the team CS located in Naples. Project scheduling entered into the PASS and into AMS will reflect ICB timelines, including target date for issuing Letters to Embassies (process improvement required).

Distribution of Construction Contract Documents: Distribution of CD-ROMs and hard-copy Plans and Specs: Number of sets required will be provided by the PM with the design release. In general, only CD-ROMs will be distributed, with the exception of the ROICC. ROICC will advise number of full and half-size sets required to the PM

For projects in Italy, two half size sets of the solicitation are to be submitted directly to Naples Mixed Commission for forwarding to the Italian Side of the Mixed Commission. This requirement, as well as any differing requirement for other Host Nations, will be indicated by the PM in the design release list.

Amendments will be distributed by the CS to the same list as the Construction Contract Documents distribution.

Pre-Bid Inquiries: The CS will forward all PBIs to the PM for transmittal to the designer of record. Turnaround for responses to the CS is three working days.

Construction Award and Administration: The Naples PM is responsible for preparing the Authorized Current Working Estimate (ACWE) assignment for MILCON projects after bid opening or after selection approval (Source Selection).

The ACWE is then chopped through the IPTL, MED Operations and the EFD PA and passed to CIBL MILCON Program Manager for approval/provision of funds. The PM will provide copy of the bid breakdown to the PLL/PLC as well as to the Norfolk Cost estimator. The PM is responsible for management of construction funds within the ACWE amount, in or out of scope determinations, and initiating all reprogramming/escalation requests.

Reprogramming requests will be prepared by the Naples PM and sent directly to CIBLM, with a copy provided to the Norfolk PA.

Escalation requests will be prepared by the Naples PM and sent directly to CIBL MILCON Program Manager, with a copy provided to the Norfolk PA.

Upon award of the construction contract, the construction CS will insure that 1) PCAS services have been awarded. Target for PCAS award is ten working days after construction contract award.

For Design Build projects the Project Manager of the design will be identified when the Acquisition Strategy is established.

Upon completion of construction, the AROICC/AREICC will forward Contractor redlined plans and revised specifications to the design production office for preparation of record drawings.

Record drawings on CD ROM will be forwarded by the design production office to the activity with a copy to the AROICC/AREICC and the PM.

The AROICC/AREICC is responsible for prompt closeout of construction contracts. The PM will be notified when the construction contract is closed out so that financial closeout can begin. The Naples CS is responsible for prompt closeout of Naples initiated design contracts as well as ACO portions of Norfolk initiated design contracts.

ROICC Operations

ROICC Support

EFA MED ROICC Operations will be responsible for ROICC office resource management, staffing, and logistic support within the MED AOR. However, LANTDIV Construction PLL will act as EFA MED's representative on boards for development of software support and other resource initiatives. In case of extraordinary circumstances and unplanned events which result in staffing shortfalls, the PLL will assist in finding extended TAD/TDY assistance from the NAVFAC pool of resources as needed. Construction policy will be issued by the PLL with review by the PLC.

PLL will participate in Field Office Assist Visits (management assist visits) as requested.

Title II planning and budget identification/execution are the PLC responsibility.

Technical Assistance (Visits)

PLL provides technical assistance in all specialties as needed during construction and for systems commissioning to include HVAC/TABs assistance, boiler inspections and certifications, power systems, technical trouble shooting, etc..

PLL provides submittal/RFI review assistance in the case of conflict between construction contractor and A/E. (Recognize A/E is first technical POC, but in case of conflict, request additional assistance)

LANTDIV provides support on sources of availability for equipment CONUS or evaluation of acceptable European Union substitutes. (Issues like ASME certified boilers etc.)

Safety

In the absence of a qualified confined space manager or asbestos/lead program manager at EFA MED, LANTDIV will provide program oversight and serve as EFA MED's command program manager.

Construction safety is the responsibility of EFA MED. Safety support and training will be provided by LANTDIV in the absence of a qualified trainer at EFA MED.

LANTDIV will provide specialized safety support in case of unusual construction processes. LANTDIV shall be available for assistance or lead on mishap investigation in case of serious mishap as requested.

Construction Quality Assurance

EFA MED will provide oversight of the CQC program

EFA MED CQC plans will be accepted at the field level. Assistance will be provided by EFA MED Headquarters as needed with backup from LANTDIV.

Constructability Reviews

Design EIC for projects will ensure adequate (2 weeks) opportunity for the ROICC and LANTDIV Construction to provide constructability review comments

Training

LANTDIV will provide assistance in obtaining training for technically specific areas for which there is NAVFAC in-house expertise (scheduling , Construction QV etc.)

Partnering

LANTDIV will provide facilitators (In-house or Contract support) for partnering sessions between ROICCs/Contractor. FIS/WIP

Provide technical support, guidance and training for entering WIP figures into FIS. For those offices with limited input capability and/or connectivity problems, LANTDIV will input WIP figures into FIS based on FAX/e-mail input.

APPENDIX C

ENVIRONMENTAL SERVICES

APPENDIX D

BASE OPERATIONS SUPPORT

APPENDIX E

HOUSING

APPENDIX F REAL ESTATE

APPENDIX G

CONTINGENCY ENGINEERING/MILOPS

APPENDIX H

HOST NATION LIAISON INFORMATION

APPENDIX I

CONTRACTS INFORMATION